

CHRIS Self Service

Creating a New Performance Plan

Introduction

The current version of the CHRIS APPAS module has been built using Oracle Self-service technology. The user will access all performance plan functions from the Main Plan Information screen. Unlike previous version there is no need to switch back and forth between the Build Performance Plan function and the Appraisal functions until it is time to complete a mid-year or annual appraisal.

Guide Contents

This guide provides instructions on how to build a performance plan from scratch in CHRIS.

Creating a New Performance Plan

Step 1

If you are a manager select GSA Manager Self-Service from the menu and then click on Build Performance Plan (APPAS) in the right hand column.

All other users select GSA Build Performance Plan and click on Build Performance Plan (APPAS) in the right hand column.


Navigator

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<ul style="list-style-type: none">GSA HR Professional Self-ServiceGSA Manager Performance PlanGSA Manager Self-ServiceGSA Personal Self-Service	GSA Manager Self-Service <ul style="list-style-type: none">Manager ViewBuild Performance Plan (APPAS)Appraisals (APPAS)AwardsChange Password and AccessibilityInbox Help <ul style="list-style-type: none">Build Performance Plan User GuideAppraisal (APPAS) User GuideAward (APRS) User Guide
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Important: The Internet Explorer or Netscape Back  button **SHOULD NOT** be used in this system to navigate between pages. Using the button will cause the system to not function properly.

Step 2

The Plan Information screen appears and provides you the option build a performance plan by clicking on the Build Performance Plan button on the right hand side of the screen.

 **U.S. General Services Administration**
Human Resources

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Plan Information

To BUILD A NEW PERFORMANCE PLAN for an associate, click on 'Build Performance Plan'.
To WORK WITH AN EXISTING PERFORMANCE PLAN, use the SEARCH function explained below to find the plan.

[Build Performance Plan](#)

WORKING WITH EXISTING PLANS:

- To search for a specific Performance Plan, first select the employee's name by using the flashlight OR by entering the employee's last name, first name in the space provided and clicking on the GO button.
- To narrow your results to a specific date range, enter a date range and click GO.
- To view all performance plans for which you are the MAIN APPRAISER, leave all fields blank, check the box next to "Plans where you are the Main Appraiser" and click GO.


OPTIONS AVAILABLE FOR THE RECORDS SELECTED:

- To make changes to an existing plan click on the UPDATE PLAN/CHANGE APPRAISER icon.
- To copy an existing plan, select the COPY icon and follow the instructions.
- To view detailed information about a plan, select the DETAILS icon.
- To view or print the worksheet or form, click on the appropriate icon.
- To write comments and/or issue critical element ratings for the mid-year progress review, click on the CREATE MID-YEAR icon and then go to APPRAISALS (APPAS).
- To evaluate performance at the end of the rating period, click on the CREATE APPRAISALS icon and then go to APPRAISALS (APPAS).
- To delete the selected plan, use the DELETE icon.


Search

Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Name


Rating Period End Date between 

(example: 28-Jul-2006)



(example: 28-Jul-2006)

☐ Plans where you are the Main Appraiser

* Effective Date 

(example: 28-Jul-2006)

Name	Main Appraiser	Appraisal Status	Perf. Plan Type	Rating Period Start Date	Rating Period End Date	Update Plan / Copy Change Appraiser	Details WorkSheet	Perf. Plan Form	Create Mid-Year	Create Appraisal	Delete
No search conducted.											

[Build Performance Plan](#)

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Step 3


The Plan Information screen will appear. To build a performance plan, fill in all of the required fields (indicated by a blue asterisk) and any other fields relevant to this plan.

Create New Performance Plan
To build a performance plan, fill in all of the required fields (indicated by a blue asterisk) and any other relevant information. To begin adding critical elements click on the 'Critical Elements' button.


If at any point an associate becomes Unratable, check the Unratable box and enter the Unratable Reason.


* Indicates required field


Plan Information


* Name 


* Performance Plan Form

* Rating Period Start Date 

* Rating Period End Date 


Performance Plan Issue Date 


Mid Year Review Date 

* Main Appraiser 

* Performance Plan Type

* Assignment Type




Appraisal Date 


PD Review Date 

Unratable Information

☐ Unratable


Unratable Reason


  

Enter the employee's last name in the Name field and hit the tab key or click on the Flashlight icon .


Search

Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Name 


Rating Period End Date between 

(example: 25-Jun-2006)





(example: 25-Jun-2006)

☐ Plans where you are the Main Appraiser



* Effective Date 

(example: 25-Jun-2006)


This will take you to the Search & Select: Name screen. Click on the Quick Select icon for the correct employee.

Search and Select List of Values - Microsoft Internet Explorer provided by General Services Administration



Search and Select: Name  











Search



To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.



Search By 

Results

Select	Quick Select	Name	Organization	Position	Grade
<input type="radio"/>		Wright,	4FB-1	Property Disposal Specialist	GS-12
<input type="radio"/>		Wright,	CX	Human Resources Specialist	GS-13
<input type="radio"/>		Wright,	3FL-B	Materials Handler	WG-06
<input type="radio"/>		Wright,	4PM-FT	Building Management Specialist	GS-11
<input type="radio"/>		Wright,	3PPDG	Realty Services Manager	GS-13
<input type="radio"/>		Wright,	FBPS	Property Marketing Specialist	GS-13
<input type="radio"/>		Wright,	9PFB	Building Manager	GS-14
<input type="radio"/>		Wright,	7FF-04	Transportation Opns Offcr(Motor)	GS-13
<input type="radio"/>		Wright,	3PA	Management Assistant (OA)	GS-06
<input type="radio"/>		Wright,	10PZ1	Realty Assistant	GS-08


When you select the correct employee, the Plan Information screen will populate the with associate data form the CHRIS database.

Create New Performance Plan
 *To build a performance plan, fill in all of the required fields (indicated by a blue asterisk) and any other relevant information. To begin adding critical elements click on the 'Critical Elements' button.


If at any point an associate becomes Unratable, check the Unratable box and enter the Unratable Reason.


* Indicates required field


Plan Information


* Name 


* Performance Plan Form

* Rating Period Start Date 

* Rating Period End Date 


Performance Plan Issue Date 


Mid Year Review Date 

* Main Appraiser 

* Performance Plan Type

* Assignment Type




Appraisal Date 

PD Review Date 

Unratable Information

☐ Unratable


Unratable Reason



  

Step 4

The Main Appraiser field will auto-populate but is an editable field. The Main Appraiser field can be changed to any authorized supervisor in GSA.


* Main Appraiser 

To change the Main Appraiser, enter the appraiser's last name in the Name field and hit the tab key or click on the Flashlight icon . This will take you to the Search and Select: Main Appraiser screen. Identify the correct appraiser and click on the Quick Select icon. This will populate the Main Appraiser field on the Create New Performance Plan screen.



Search and Select: Main Appraiser  



Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By 

Results

Select	Quick Select	Full Name	Organization	Job	Position	Grade
			CID	2210.Information Technology Management	Supervisory IT Specialist	GS-15

Step 5

Next, you will need to select the correct performance plan in the Performance Plan Form field.

Create New Performance Plan
*To build a performance plan, fill in all of the required fields (indicated by a blue asterisk) and any other relevant information. To begin adding critical elements click on the 'Critical Elements' button.

If at any point an associate becomes Unratable, check the Unratable box and enter the Unratable Reason.

* Indicates required field

Plan Information

* Name [text field] * Main Appraiser [text field]

* Performance Plan Form [dropdown menu] * Performance Plan Type [Annual]

* Rating Period Start Date [31-Oct-2005] * Assignment Type [Primary]

* Rating Period End Date [30-Sep-2006] Appraisal Date [text field]

Performance Plan Issue Date [text field] PD Review Date [text field]

Mid Year Review Date [text field]

Unratable Information

☐ Unratable

Unratable Reason [text field]

Back Save Critical Element

Click on the grey arrow box on the right hand side of the Performance Plan Form field, which will display a drop down list of values. Select the appropriate form by double clicking on it.

* Performance Plan Form [Non-supervisory Associates]

* Rating Period Start Date

* Rating Period End Date

Performance Plan Issue Date

Mid Year Review Date

Non-supervisory Associates

Non-supervisory Associates

Non-SES Management and Supervisory Associates

OIG Non-SES Management and Supervisory Employees

AFGE Bargaining Unit Employees

NFFE Bargaining Unit Employees

Step 6

The Rating Period Start and End Date fields will default to the current fiscal year. Verify that these are the correct dates for these fields.

The Performance Plan Type field will default to Annual but can be changed to Detail by clicking on the grey arrow box in the right hand side of the field.

The Assignment Type field will default to Primary but can be changed to Interim by clicking on the grey arrow box in the right hand side of the field.

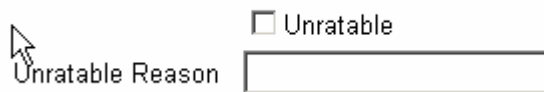
The other date fields - Performance Plan Issue Date, Mid-year Review Date, Appraisal Date and PD Review Date can be entered with the appropriate values after the supervisor has met with the employee.

Creating a New Performance Plan

Step 7


Also, in the Create New Performance Plan screen, the option to identify an employee as unratable is available. If at some point during the rating period an employee becomes unratable, click in the Unratable box and enter a free form text description in the unratable reason field. This can be removed at any time.

Unratable Information

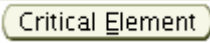


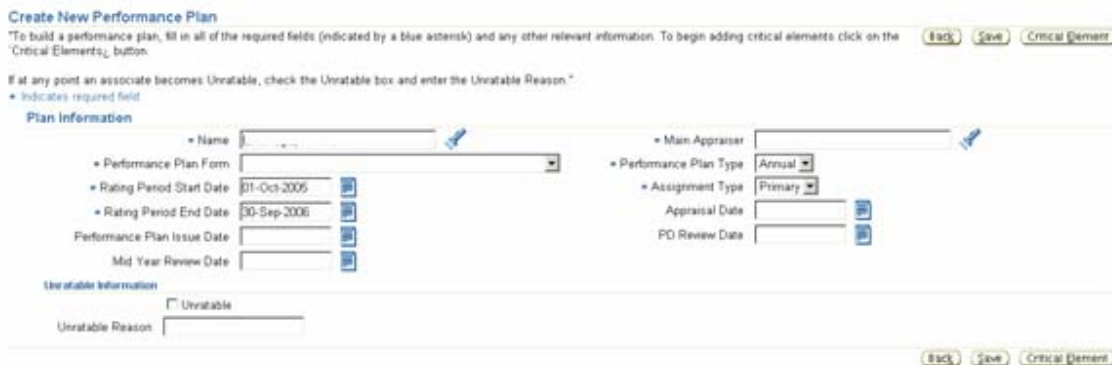
A mouse cursor points to the 'Unratable Reason' text input field. To its left is a checkbox labeled 'Unratable'.

Step 8

Once you have all necessary information entered click on the Save button .

Step 9

Next you will start building the plan by clicking on the Critical Element button .



The screenshot shows the 'Create New Performance Plan' form. At the top, there are instructions and buttons for 'Back', 'Save', and 'Critical Element'. Below this is a section for 'Plan Information' with fields for Name, Performance Plan Form, Rating Period Start Date (01-Oct-2005), Rating Period End Date (30-Sep-2006), Performance Plan Issue Date, and Mid Year Review Date. To the right are fields for Main Appraiser, Performance Plan Type (Annual), Assignment Type (Primary), Appraisal Date, and PD Review Date. At the bottom, there is an 'Unratable Information' section with an 'Unratable' checkbox and an 'Unratable Reason' text field. The 'Back', 'Save', and 'Critical Element' buttons are repeated at the bottom right.

This will take you to the Critical Element Information page. You can begin adding Critical Elements by clicking the Add Critical Element button **Add Critical Element**.

The critical element Group name will default according to the type of Performance Plan form selected. Assign a number to the Critical Element in the CE# field, enter the Critical Element Name in the CE Name field and assign the appropriate weighting percentage in the % field.


Step 10

The large text box just below these fields is for the Critical Element description. This field comes auto-populated for the Non-SES Management and Supervisory Associates form and optional for all others. This is an editable field and text can be entered through the user's keyboard or by cutting and pasting from external programs such as Microsoft Word.

Step 11

You can add specific measure details for each critical element by clicking on the

Measure Details

Measure Details icon  of the critical element you are currently working on. The screen will now display the Measure Information section for the Critical Element you are building. Enter the General Measure, Specific Measure, Derived From and Feedback Source in the appropriate fields. If you have multiple sets of measure information for a single critical element you can use the Measure% field to enter the weighting percentage for each set.

Important: None of the fields in this section are required but if you use the Measure% field the total for all measure information for any one critical element must equal 100%.

Plan Information

Name: _____ Form: **Non-supervisory Associates**

Rating Period Start Date: **01-Oct-2005** Performance Plan Type: **Annual**

Rating Period End Date: **30-Sep-2006**

Critical Element Information

Group: **Critical Elements** Critical Element Name: **Workload Management**

Critical Element #: **1** Critical Element Percentage: **40**

Measure Information

Measure #	General Measure	Specific Measure	Desired Value	Feedback Source	Measure % Weight
Add New Measure					
Level Information					
Level Description					
1	Does not meet performance expectations as defined in Level 3				
2	Partially meets performance expectations as defined in Level 3				
3	Meets performance expectations. Objectives, activities, and specific tasks associated with each critical element are carried out with expected levels of quantity, quality, timeliness and cost-effectiveness in accordance with performance plan. Responsibilities are carried out in accordance with all official guidance, policies, and applicable laws, rules and regulations.				
4	Meets and often exceeds performance expectations as defined in Level 3				
5	Meets and consistently exceeds performance expectations as defined in Level 3				

Control Save

Step 12

Just below the measure information section is the Level Information section for the Critical Element you are building. Each of the five rating levels comes auto-populated with the default APPAS descriptions. These are editable fields and text can be edited through the user's keyboard or by cutting and pasting from external programs such as Microsoft Word.


Level Information

Level Description

1	Does not meet performance expectations as defined in Level 3
2	Partially meets performance expectations as defined in Level 3
3	Meets performance expectations. Objectives, activities, and specific tasks associated with each critical element are carried out with expected levels of quantity, quality, timeliness and cost-effectiveness in accordance with performance plan. Responsibilities are carried out in accordance with all official guidance, policies, and applicable laws, rules and regulations.
4	Meets and often exceeds performance expectations as defined in Level 3
5	Meets and consistently exceeds performance expectations as defined in Level 3


Step 13

In the case that you have multiple sets of measure details for the critical element you are building you can add additional sets of measure details by clicking on the

Add New Measure button . By clicking on the select button next to the measure, you can edit the level descriptions.

Measure Information

Select	*Measure #	General Measure	Specific Measure	Derived From	Feedback Source	Measure %	Delete
	1	Workload Management	Quality	PD	Supervisor		
	2	Workload Management	Quantity	PD	System Reports		
	3	Workload Management	Timeliness	PD	System Reports		



You are currently working on measure 1

Level Information

Level Description


1	Does not meet performance expectations as defined in Level 3
2	Partially meets performance expectations as defined in Level 3
3	Meets performance expectations. Objectives, activities, and specific tasks associated with each critical element are carried out with expected levels of quantity, quality, timeliness and cost-effectiveness in accordance with performance plan. Responsibilities are carried out in accordance with all official guidance, policies, and applicable laws, rules and regulations.
4	Meets and often exceeds performance expectations as defined in Level 3
5	Meets and consistently exceeds performance expectations as defined in Level 3

Important: Please note that if you enter a value in the Measure % field, it will not be calculated to determine the summary rating. This is only for the appraiser's use in determining the rating and for display purposes on the Worksheet. Only the Critical Element % will be calculated for the Summary Rating.

Measure Information

*Measure #	General Measure	Specific Measure	Derived From	Feedback Source	Measure %	Delete
1	Workload Management	Quality	PD	Supervisor	40	
2	Workload Management	Quantity	PD	System Reports	40	
3	Workload Management	Timeliness	PD	System Reports	20	

Step 14

When you have finished entering all of the data to build your Critical Element, click on the Save button  to return to the plan Information screen.

Step 15

At any point while you are building your performance plan you can view an outline format of the plan by clicking the Preview button **Preview** from the Plan Information page.

Critical Element Information
*Click on the Add Critical Element button.
Enter Critical Element #, Critical Element Name, % weighting.
To add Specific Measures click on the Measure Details icon.
Click on the Preview button to review plan entries."

[Return to Plan Information](#) [Preview](#) [Back](#) [Save](#)

Plan Information

Name: _____ Form: **Non-supervisory Associates**
Rating Period Start Date: **01-Oct-2005** Performance Plan Type: **Annual**
Rating Period End Date: **30-Sep-2006**

Critical Elements

Details Group	CE #	CE Name	%	Measure Details	Delete
▼ hide Critical Elements	1	Workload Management	40		
▼ hide Critical Elements	2	Budget Management	40		
▼ hide Critical Elements	3	Customer Service	20		

[Add Critical Element](#)

Below is an example of the Preview Page. This will display all the information that has been entered. You can use the scroll bar on the right to continue through long plans.

You must click on the Back button, **Back** to return to the Plan Information screen.

Plan Information [Back](#)

Name: _____ Occupational Series: **0201 Human Resources Management** Organization: **JPH**
Position: **Supervisory Human Resources Specialist GS15,00069.075** Pay Plan & Grade / Level: **GS-15**

Performance Plan

Form: **Non-supervisory Associates** Rating Period Start Date: **01-Oct-2005** Mid Year Review Date: _____
Assignment Type: **Primary** Rating Period End Date: **30-Sep-2006** Plan Issue Date: _____
Main Appraiser: _____ Appraisal Date: _____ Unratable: **No**
Appraisal Type: **Annual** PD Review Date: _____ Unratable Reason: _____

Critical Elements

Details Group Name	CE Name	%	CE #
▼ hide Critical Elements	Workload Management	40	1

Measure

Details Measure #	Derived From	Specific Measure	General Measure	Feedback Source	Measure %
▼ hide 1	PD	Quality	Workload Management	Supervisor	40
Levels					
Level Description:					
1 Does not meet performance expectations as defined in Level 3					
2 Partially meets performance expectations as defined in Level 3					
3 Meets performance expectations. Objectives, activities, and specific tasks associated with each critical element are carried out with expected levels of quantity, quality, timeliness and cost-effectiveness in accordance with performance plan. Responsibilities are carried out in accordance with all official guidance, policies, and applicable laws, rules and regulations.					
4 Meets and often exceeds performance expectations as defined in Level 3					
5 Meets and consistently exceeds performance expectations as defined in Level 3					
▼ hide 2	PD	Quantity	Workload Management	System Reports	40
Levels					
Level Description:					
1 Does not meet performance expectations as defined in Level 3					
2 Partially meets performance expectations as defined in Level 3					
3 Meets performance expectations. Objectives, activities, and specific tasks associated with each critical element are carried out with expected levels of quantity, quality, timeliness and cost-effectiveness in accordance with performance plan. Responsibilities are carried out in accordance with all official guidance, policies, and applicable laws, rules and regulations.					
4 Meets and often exceeds performance expectations as defined in Level 3					
5 Meets and consistently exceeds performance expectations as defined in Level 3					
▼ hide 3	PD	Timeliness	Workload Management	System Reports	20
Levels					
Level Description:					
1 Does not meet performance expectations as defined in Level 3					
2 Partially meets performance expectations as defined in Level 3					

Once you have completed building the plan, click the Save button **Save** then click the Return to Plan Information button **Return to Plan Information**.

Critical Element Information
*Click on the Add Critical Element button.
Enter Critical Element #, Critical Element Name, % weighting.
To add Specific Measures click on the Measure Details icon.
Click on the Preview button to review plan entries.*

[Return to Plan Information](#) [Preview](#) [Back](#) [Save](#)

Plan Information

Name: **Non-supervisory Associates**
Rating Period Start Date: **01-Oct-2005**
Rating Period End Date: **30-Sep-2006**
Performance Plan Type: **Annual**

Critical Elements

Details Group	CE #	CE Name	%	Measure Details	Delete
Critical Elements	1	Workload Management	40		
Critical Elements	2	Budget Management	40		
Critical Elements	3	Customer Service	20		

[Add Critical Element](#)